

A STUDY TO DEVELOP CUSTOMER SERVICE TRAINING FOR THE  
RECEPTION STAFF AT ADVANCED HEALTHCARE

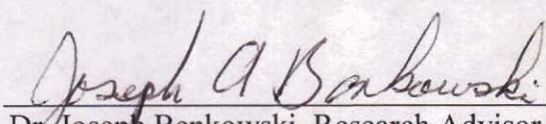
by

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ABSTRACT

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<u>A Study to Develop Customer Service Training for the Reception Staff at Advanced Healthcare.</u>		
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Advanced Healthcare found that the personal manner of the receptionist plays a key role in determining whether or not a patient will choose to return to Advanced Healthcare. Though this is only one of several factors, Advanced Healthcare feels that it is important to focus on developing the customer service skills of the receptionist population within the organization. Advanced Healthcare's long-term goal is to be the preferred physician healthcare organization in southeastern Wisconsin. To achieve this goal it is essential to spend time and money improving the skills of its front-line staff.

This study is being conducted to develop customer service training for existing and new receptionists at Advanced Healthcare to increase Advanced Healthcare's customer service survey results and ultimately provide excellent customer service. Advanced Healthcare's Reception Enhancement Team developed three forms of instrumentation with the intent of viewing and measuring all angles of customer service

provided by the reception staff. These methods include supervisor focus groups, waiting room observations, and informal follow up surveys with patients. The participants of the study will include supervisors of reception areas, receptionists, and patients who completed the "How'd we do?" comment card provided by Advanced Healthcare.

The researcher will use data gathered from this research to meet the three main goals of this study. These goals are identifying the needs of the receptionists at Advanced Healthcare to improve customer service, providing the receptionists with the tools necessary to provide excellent customer service that is in line with Advanced Healthcare's strategic plan, and to develop a curriculum for receptionists in line with Advanced Healthcare's strategic plan. This study will help Advanced Healthcare determine how to move forward in helping their receptionists achieve the organization's patient satisfaction goals.

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## CHAPTER 1

### INTRODUCTION

In 1998 two successful healthcare organizations, Falls Medical Group and Milwaukee Medical Clinic, merged together to become Advanced Healthcare, which is now the largest physician owned and led group practice in Southeastern Wisconsin. Advanced Healthcare found, like many other organizations that merging two corporate cultures is a difficult task, and is something that the organization is still struggling with over five years later. Advanced Healthcare's overall goal is to become the preferred physician healthcare organization in Southeastern Wisconsin. This means that when a customer has the ability to choose where he or she would like to receive their health care, they choose Advanced Healthcare.

Advanced Healthcare conducted a patient care survey in 2000, which surveyed patient customers to evaluate their perception of the customer service they receive at Advanced Healthcare. The results of the aforementioned survey indicate that compared to other healthcare organizations in the Milwaukee area patients feel that the customer service patients they receive at Advanced Healthcare is mediocre. Therefore, Advanced Healthcare, determined to be set apart from its competitors, incorporated customer service into the organization's strategic plan.

In response to the survey results, in 2002, Advanced Healthcare developed a workshop entitled Customer Care to enhance everyday customer service skills, build on existing customer service strengths and to develop a common method and language throughout the organization. The Customer Care initiative involves the entire organization and focuses on the importance of providing both excellent internal and



external customer service. By starting at the top of the organization with the board of directors and then filtering the workshop and its goals downward to the physician owners, management staff, existing employees, and finally new employees Advanced Healthcare was able to include all employees and develop a commitment to the customer service initiative.

In 2003, Advanced Healthcare repeated the customer service survey and noticed a slight improvement in the results. However, the survey indicated that patients continue to feel that the customer service Advanced Healthcare provides is mediocre compared to other health care organizations in the Milwaukee area. After reviewing the survey results, Advanced Healthcare again incorporated customer service into the strategic plan of the organization, this time as the number one initiative in 2004.

Advanced Healthcare also found that there are four key questions in the survey that indicate whether or not a patient customer would refer a friend or family member to Advanced Healthcare. Those questions measure the personal manner of the physician, the technical ability of the physician, access, and the personal manner of the receptionist. With this in mind Advanced Healthcare feels that it is important to focus on these individual areas within the customer service initiative of the strategic plan.

In effort to increase scores in the area of measuring the personal manner of the receptionist, Advanced Healthcare developed the Reception Enhancement Team. This team which is made up patient care, ancillary service and administrative staff is dedicated to determining the best way to address this challenge. After conducting supervisor focus groups, waiting rooms observations and informal follow ups with patients the Reception Enhancement Team determined the best way to improve customer service is by offering

customer service training to Advanced Healthcare's reception staff. This study is being conducted to develop customer service training for existing and new receptionists at Advanced Healthcare to increase Advanced Healthcare's customer service survey results and ultimately provide excellent customer service

### Statement of Problem

To develop customer service training for new and existing receptionists at Advanced Healthcare's to improve customer service.

### Purpose of the Study

This study is essential to bring up the standards of Advanced Healthcare. It is the organization's goal to be the preferred physician healthcare organization in southeastern Wisconsin. It is only when patients perceive the customer service they receive from Advanced Healthcare's receptionists is excellent that Advanced Healthcare will see a significant improvement in survey results.

### Research Objectives

This study addresses the following objectives:

1. To identify the needs of reception staff at Advanced Healthcare to improve customer service.
2. To provide receptionists with the tools necessary to provide excellent customer service that is in line with Advanced Healthcare's strategic plan.
3. To develop a curriculum for receptionists in line with Advanced Healthcare's strategic plan.

### Limitations of the Study

This study has the following limitations:

1. The results of this study are limited to the receptionists of Advanced Healthcare and may not be applicable to other health care organizations.
2. The focus of the study is to align the reception staff with Advanced Healthcare's corporate goal and initiatives.
3. The observation results are limited to those receptionists who were observed providing customer service to patients.
4. The focus group response is limited to the opinions of the supervisors who attended the focus group sessions.
5. The customer service survey results are limited to patients who complete the survey.

### Assumptions of the Study

Assumptions of this study include:

1. Advanced Healthcare will continue to place an emphasis on the organization's strategic plan including customer service.
2. Advanced Healthcare will continue to have low reception turnover rates.

### Definition of Terms

Receptionist – A person employed to greet telephone callers, visitors, patients, or clients (*Merriam Webster's Collegiate Dictionary Tenth Edition*).

Reception Enhancement Team – Advanced Healthcare management staff dedicated to improving the customer service skills of Advanced Healthcare Receptionists to increase customer service survey results (Advanced Healthcare, 2004).

## CHAPTER II

### LITERATURE REVIEW

#### Introduction

This study is essential to bring up the standards of reception staff at Advanced Healthcare. It is the organization's goal to be the preferred physician healthcare organization in southeastern Wisconsin. It is only when patients perceive the customer service they receive from Advanced Healthcare's receptionists is excellent that Advanced Healthcare will see a significant improvement in survey results.

This review of literature will explore Advanced Healthcare's customer service expectations, the importance of customer service training, as well as general customer service best practice techniques found in various forms of literature. Other topics included in this review of literature are customer service statistics, instructional design techniques, and group facilitation techniques.

#### Advanced Healthcare's Customer Service Expectations

When Advanced Healthcare surveyed their patients to find out what they wanted from their healthcare provider they responded with four key satisfaction points, access, ambiance, answers and attitude (Advanced Healthcare, 2000). These patient satisfaction points are now the foundation of Advanced Healthcare's Customer Service Strategy which was developed in 2000:

The strength of relationships we develop will ensure that we are closest to our patients needs.... We will demonstrate our commitment to our patients and each other by focusing on four key satisfaction points:

Access – Patients and caregivers who are open and available



Ambiance – Clean, neat environment throughout all facilities

Answers – Timely responses to all requests and expectations

Attitude – Positive contact with all Advanced Healthcare personnel.

(Advanced Healthcare, 2000)

Advanced Healthcare's own customer service training program entitled Customer Care was presented to the entire staff including front line employees, management, and physicians to enhance everyday customer service situations as well as provide a strategy for handling difficult customers (Advanced Healthcare, 2002). Customer Care recommends Advanced Healthcare's employees use an interaction process with their customers that consists of greeting the customer, identifying their needs, providing for their needs, assuring their needs are met, and closing each customer interaction (Advanced Healthcare, 2002). Other recommended communication skills in the Customer Care program are building rapport, active listening, and using positive language (Advanced Healthcare, 2002). Customer Care also trains employees to handle difficult customers by utilizing the I CARE tool; the acronym I CARE stands for identify an unhappy customer, carefully listen, acknowledge the problem, remain calm, and ensure action (Advanced Healthcare, 2002).

According to Advanced Healthcare's Customer Service Standards it is essential to ensure smooth and efficient communication in the following areas: telephones skills, voice mail, face to face contact with patients, appearance and conduct, and working with other departments (Advanced Healthcare, 2004). Some ways to ensure communication is smooth and efficient is to be a good listener, personalize conversations, use a professional

voice when speaking, deliver clear accurate instructions, and respond to requests from other departments in a timely manner (Advanced Healthcare, 2004).

Advanced Healthcare's strategic plan for 2004 states, "Patient satisfaction is our first priority." With this in mind Advanced Healthcare solicited help from Bayer Institute to train physicians in their Clinician Patient Communication program. This program puts a new spin on customer service by focusing on building relationships with patients instead of just providing a service (Bayer, 2004). The physicians were encouraged during the program to build patient relationships by utilizing the four Es: Engagement, Empathy, Education, and Enlistment.

#### Customer Service Training

Training Magazine says, "good training is critical to good front-line service." It is essential to train employees to handle the human side first, when you do this, the business side goes much quicker (Zemke, 1986, August).

Zielinski (1990) feels that training is a major part of successful customer service strategies. He also references that in order for the customer service training to be successful it should be linked to the company's organizational goals (17-18). Not only should the front-line employees be trained, but there should be support from management levels as well. It is the responsibility of management staff to role model the customer service techniques trained to the front-line employees as well as to praise the employees for utilizing the skills successfully (10).

Healthcare Customer Service Consultants provides customer service training for healthcare organizations to help them go from just surviving to successful. They feel that customer service goes beyond just smiling and that training can help front-line employees

know how to successfully handle customers. This training includes the importance of nonverbal gestures, listening skills, and customer retention

(<http://healthcaredynamics.com/pas/hcd-cs.html>).

### Customer Service Best Practice

To help customer service providers remember that they have both internal and external customers, V. Gee and J. Gee (1999) authors of Super Service, define customer as “anyone who is not me” (p.21). According to V. Gee and J. Gee it is essential to turn negatives into positives, “Instead of ‘I can’t do numbers,’ say, ‘I’m getting better at numbers’” (p.87).

The National Institute of Business Management claims “Customer Service is made up of many little incidences, and of individual efforts to demonstrate concern. But they add up to a big picture – the image the public has of your company” (Teatzsch, Gruber, Keane, Mularczyk, Valdez & Rolothan 1987, p.2). The National Institute of Business Management also encourages customer service providers to recognize stress in their lives saying that “you’ll be better prepared to confront a difficult customer situation,” if you do (Teatzsch et al, 1987, p.52).

Professionalism plays a key role in customer service. Maintaining a professional attitude when faced with menial, embarrassing, or unpleasant tasks is a true test of a professional (Northwest Regional Educational Laboratory, 1998). Sincerity is the basis for developing a style all one’s own, and that one’s should not be feigned, put on, or affected (Northwest Regional Educational Laboratory, 1998).

You can identify a customers needs by listening.

Five ways to be a better listener:

1. Stop talking.
2. Avoid distractions.
3. Concentrate on what the other person is saying.
4. Look for the “real” meaning.
5. Provide feedback to the sender.

(Martin, 1999, p.44)

To provide excellent customer service over the phone, The Einstein Consulting Group recommends, “Put a smile on your face even before you say ‘hello.’ Your attitude will come across in your voice,” (Leebov, 1990, p.21).

The Einstein Consulting group also states that customer satisfaction is a primary goal of any service organization, and your health care organization is no exception. It is important to listen to complainers, express empathy, and take action (Leebov, 1990, p.18).

#### Customer Service Statistics

According to Training and Development Magazine, most companies lose a third of their customers per year; getting a new customer costs five times more than keeping current ones (Kaplan-Leiserson, 2004, August).

Super Service indicates that sixty-eight percent of customers are lost because an employee didn’t handle their complaint well, and that out of twenty-five upset customers one complains and the twenty-four others are dissatisfied, but do not complain and instead tell between ten and twenty others (Gee, 1999, p. 10).



Zielenski (1990) reminds organizations that a variety of actions can be taken by upset customers, eighty-two percent of them will respond by boycotting a store or brand (p.121).

### Instructional Design

Huitt's (2003) article, Classroom Instruction, provides a comparison of direct instruction models that incorporate principles of teacher direction and student-teacher interaction. The most recent model is Slavin's 1994 model:

1. State learning objectives and orient students to lessons.
2. Review prerequisites.
3. Present new material.
4. Conduct learning probes.
5. Provide independent practice.
6. Assess performance and provide feedback.

According to Bob Mosher of Element K, "Students in class may know the general purpose of the content, as well of the training event, but most learner control stops there," ([http://elementk.com/training\\_advice/htm/06-02-importanceodif.asp](http://elementk.com/training_advice/htm/06-02-importanceodif.asp)).

The challenge in designing instructional materials for adult learners is not merely to communicate effectively; it is also to bridge the gap between adult learners of different educational backgrounds, attitudes, skill levels, and learning styles (<http://hcc.cc.il/online/ACSM155/Lesson11/Instructional%20Principles%2011.doc>).

Training and Development Magazine states, "No doubt, adults retain more information when they are actively engaged in the learning process, and most trainers

understand the importance of active learning for teaching skills,” (Mierson & Freiert, 2004, October). Before any learning can be accomplished, you must provide appropriate structure (Mierson & Freiert, 2004, October).

### Group Facilitation

James Neil encourages facilitators to create a non-threatening social environment in which everyone feels welcome to participate; experiencing social support during a program has been found to be an important factor in determining outcomes (<http://www.wilderdom.com/games/TeamBuildingFacilitationGuide.html>).

Successful facilitators possess a variety of skills. Effective facilitators are flexible, adaptive, proactive, responsive, and resilient (<http://www.thiagi.com/article-secrets.html>). This means that facilitators should be able to modify their style to accommodate the group.

Helping participants (and colleagues) to maximize the benefits of collaborative working depends quite significantly on choice of group size (Race, 1988, p.102).

### Summary

Literature suggests that there are a variety of topics covered under the umbrella of customer service; all of these topics are of equal importance need to be considered while designing customer service training for Advanced Healthcare. Advanced Healthcare's expectations are supported by customer service best practices found throughout a variety of other literature sources. This will help determine the most important skills to incorporate in the customer service training program to achieve the organization's goal to be the preferred physician healthcare organization in southeastern Wisconsin.

How the information is presented is as important as the information itself. Instructional design and group facilitation skills need to be considered to make Advanced Healthcare's customer service training program a success. It is essential to provide training that the participants feel is valuable, keeps their interest and is presented in a manner that is comfortable for all skill levels of receptionists.



## CHAPTER III

### METHODOLOGY

#### Introduction

This study is being conducted to develop customer service training for existing and new receptionists at Advanced Healthcare to increase Advanced Healthcare's customer service survey results and ultimately provide excellent customer service. Advanced Healthcare's Reception Enhancement Team developed the three forms of instrumentation with the intent of viewing all angles of customer service perception. These methods include supervisor focus groups, waiting room observations, and informal follow up surveys with patients.

#### Research Design

In effort to increase scores in the area of measuring the personal manner of the receptionist, Advanced Healthcare developed the Reception Enhancement Team. This team which is made up patient care, ancillary service and administrative staff is dedicated to determining the best way to address this challenge. After conducting supervisor focus groups, waiting rooms observations and informal follow ups with patients the Reception Enhancement Team determined the best way to improve customer service is by offering customer service training to Advanced Healthcare's reception staff.

#### Population

For the purpose of this study the population is determined as three groups which either determine the definition of excellent customer service or who are responsible for providing customer service at Advanced Healthcare. The participants are patient care supervisors, receptionists, and patients.



Supervisors of Advanced Healthcare's receptionists and supervisors of staff who could be viewed as receptionists, even though it is not their official title, were invited to participate in focus groups to discuss customer service training needs for their staff. The participants are all current supervisors and have employees who either are receptionists or could be viewed as receptionists by patients. There are both male and female supervisors.

Waiting room observations were conducted by training and development staff to view receptionists through the patient's eyes. Random receptionists at Advanced Healthcare's clinics were observed providing customer service to patients. All receptionists observed either have the job title of receptionist or could be viewed by the patient as the receptionist because they work behind the reception desk. There are both male and female receptionists.

Patients who completed Advanced Healthcare's "How'd we do?" comment cards and included their name and contact information were contacted to complete informal follow up surveys. This population was made up of patients who scored the clinics in the range of poor, fair, good, and excellent in realm of customer service. This population was made up of both male and female patients.

#### Instrumentation

Three forms of instrumentation were used to as measure of evaluation: supervisor focus groups, waiting room observations, and informal follow up surveys with patients. The subjects will be supervisors of reception areas, receptionists, and patients who completed the "How'd we do?" comment card.

Advanced Healthcare's Reception Enhancement Team developed the three forms of instrumentation with the intent of viewing all angles of customer service perception.

The researcher intends to view these results to determine how to best meet receptionist's needs in customer service training.

The supervisors were asked in focus groups to answer two open ended questions and to add additional comments to clarify their responses. To view the questions the supervisors who attend the focus groups were asked to answer refer to appendix A. The supervisors were asked, in their opinion what areas of customer service could their staff use additional training. The focus group facilitator recorded these comments and opinions.

The observer performing the waiting room observation was asked to complete a questionnaire rating the customer service observed. To view the questions the observers were asked to answer refer to appendix B. The observer will sit in each waiting room area and quietly observe the reception staff without notifying the staff that they rating the customer service provided by the receptionist. The observer will rate a variety of customer service skills in four general areas that coincide with Advanced Healthcare's customer service strategy: access, ambiance, answers, and attitude. The observer will be provided a worksheet to complete. All information gather by the observer will be complied by the Training and Development Department.

The patient's who have completed the "How'd we do?" comment card and provided their name and contact information were asked open ended follow up questions to determine why they scored the customer service they received at Advanced Healthcare as excellent or as less than excellent. To view the questions the patients were asked to answer refer to appendix C. The patient's answers were recorded by the interviewer and complied by the Quality Assessment Department.

### Data Collection Procedures

The data was collected in three different formats, focus groups, observation worksheets and informal follow up surveys with the assistance of Advanced Healthcare's Training and Development Department and the Quality Assessment Department.

Supervisor names were provided by the Advanced Healthcare Human Resources Department and participation in the focus groups was voluntary. Two focus groups were held, one at the Good Hope Road Clinic and the other at the Menomonee Falls Clinic.

Waiting Room observations were conducted by the Training and Development Department who were previously determined to be a neutral source by the Reception Enhancement Team. Reception areas at each clinic were selected at random and viewed for approximately a half hour. Clinic participation was determined by patient care directors – all Advanced Healthcare clinics participated in reception observations.

Informal follow-up surveys were conducted by the Quality Assurance Department which has experience surveying patients. Patients provided their own contact information on the previously completed, "How'd we do?" comment card. Participation in the survey was voluntary.

### Data Analysis

The researcher will run appropriate descriptive statistics on the data collected. To address the objectives, calculations will be conducted as well as frequencies to analyze the data. Open ended question answers will be collected and compared to identify themes in the responses.

### Assumptions

The following assumptions are given for supervisor focus group participants:

1. Supervisors would be honest about their answers and opinions
2. Supervisors would want their opinions to contribute to the receptionist's success
3. Training would be designed based upon supervisors responses to questions

The following assumptions are given for the persons conducting the observation, the observer, and the reception staff being observed:

1. Observers would be honest about what they observed in reception areas
2. Observers would not discriminate against reception groups
3. The reception staff being observed would perform customer service tasks as usual
4. Training would be designed based upon observer scores and comments

The following observations are given for patients participating in the informal follow up surveys:

1. Patients would be honest about their answers and opinions
2. Patients would want their opinions to contribute to the receptionist's success
3. Training would be designed based upon patients responses to questions



## CHAPTER IV

### RESULTS OF THE STUDY

#### Introduction

This chapter will discuss the results of the supervisor focus groups, the waiting room observations, and the informal follow up surveys conducted by Advanced Healthcare's Reception Enhancement Team. The researcher will use data gathered from this research to meet the following objectives of this study:

1. To identify the needs of reception staff at Advanced Healthcare to improve customer service.
2. To provide receptionists with the tools necessary to provide excellent customer service that is in line with Advanced Healthcare's strategic plan.
3. To develop a curriculum for receptionists in line with Advanced Healthcare's strategic plan.

#### Population and Analysis

Three populations were studied, the reception supervisors, the observed receptionists and the patients reactions. Twenty-seven supervisors were invited to attend one of two focus group sessions. Twenty-one (77.8%) supervisors participated in the focus group sessions, eight in session one and eleven in session two. Two observers observed receptionists in a variety of reception areas throughout Advanced Healthcare's fourteen clinics. Out of twenty-four reception areas, eighteen (75%) were observed for a half hour. Seventy-three patients turned in "How'd We Do?" comment cards and provided their contact information. Out of the Seventy-three patients, Advanced Healthcare was able to reach forty-four (60.2%) of them for more information.

The data was collected by Advanced Healthcare's Reception Enhancement Team and presented to the researcher for analysis. The results of the research are found in this chapter.

### Supervisor Focus Group Findings

#### Question 1

Supervisors were asked: What skills do you feel your receptionists are missing?

Focus group one response:

Table 1: Skills Receptionists are Missing – Focus Group 1

Dialog <u>not</u> to blame others
Stress management
Staying positive and not taking things personally
Dressing appropriately
Written communication skills
Being flexible
Taking ownership of a situation – Doing what it takes to help
Building smart phrases
Professionalism
Achieving professional satisfaction
Responding appropriately when asked to do something they don't want to do
Consistently using a positive tone of voice
Bringing personal problems to work
Viewing each other as professional – Peer respect
Taking care of personal business at work
Taking care of the patient first
Knowing how important their role is - Creating pride
Knowing it's ok to say, "I don't know and I will get back to you."



Focus group two response:

Table 2: Skills Receptionists are Missing – Focus Group 2

Guidelines of where to send/transfer people when a patient call with wrong department
Resource: Frequently asked questions for receptionists
Listening skills – so they are not always asking the pt. to repeat themselves
Balancing tasks (ie. Phone/In person)
Interrupting politely
Making judgment calls depending on the circumstances (Balancing)
Personal chitchat vs. phone ringing
Portraying a professional image (Face to face)
It is the perception of the patient that matters
How to handle defensiveness
Work ethic – Back to basics (Please/Thank you)

## Question 2

Supervisors were asked: What do you think your reception staff would ask for?

Focus group 1 response:

Table 3: What Supervisors Think Receptionists Would Ask For – Focus Group 1

Respect
More recognition
Positive Feedback
Money
Realistic Expectations
Help with phone stats
Help with difficult coworkers
Help working with physicians

Focus group two response:

Table 4: What Supervisors Think Receptionists Would Ask For – Focus Group 2

More time (They're busy)
More understanding from others of what they do
They feel like more and more is being taken away - their hands are tied
More supervisor support
Resource of physician schedules

## Waiting Room Observation Findings

Two observers were asked to rate receptionists in four areas of customer service that coincide with Advanced Healthcare's customer service strategy: access, ambiance, answers, and attitude.

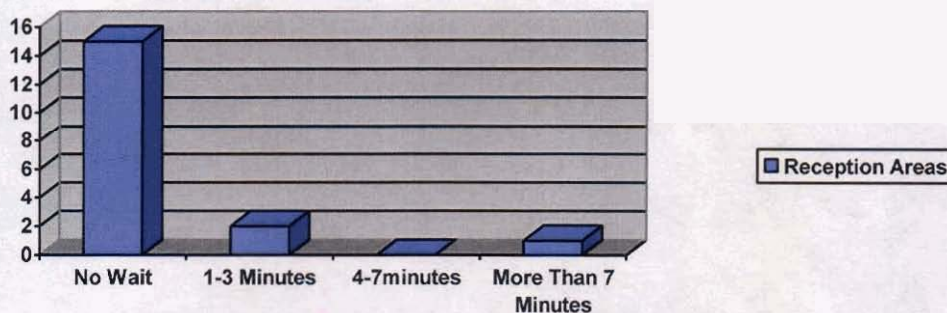
### Section 1

Section one of the observation worksheet asked the observers to assess the access provided by receptionists.

#### Question 1

Observers were asked: On average, how long did patients wait to talk to a receptionist? The observers responded that in fifteen reception areas there was no wait, in two reception areas there was a 1-3 minute wait and in 1 reception area there was a more than seven minute wait to speak to a receptionist.

Figure 1: Wait to Talk to Receptionist

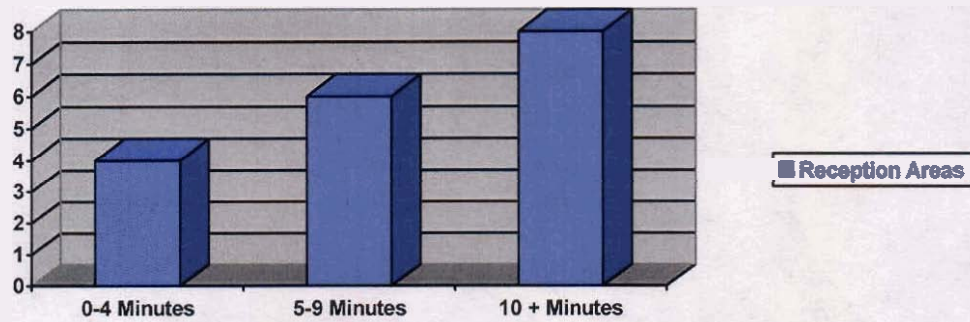


#### Question 2

The observers were asked: On average, how long did patients wait before they were called by the nurse? The observers responded that on averaged patients waited 0-4 minutes in four reception areas, 5-9 minutes in six reception area, and 10 minutes or more in eight reception areas before they were called by a nurse.



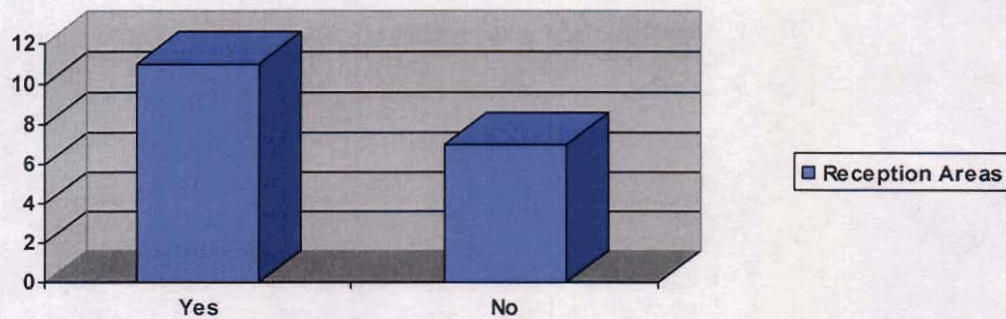
Figure 2: Wait to Be Called by the Nurse



### Question 3

The observers were asked: Were the patients welcomed by the reception staff? The observers responded that eleven reception areas welcomed the patients and seven areas did not.

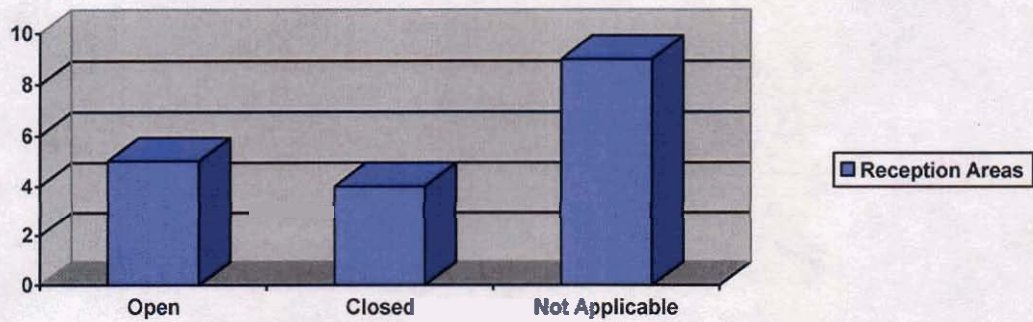
Figure 3: Welcomed by the Reception Staff



### Question 4

The observers were asked: Were the glass sliding windows separating the receptionists from the patients kept open or closed? The observers responded that the glass sliding windows open in five reception areas, closed in four reception areas, and that nine reception areas did not have sliding glass windows.

Figure 4: Sliding Glass Windows



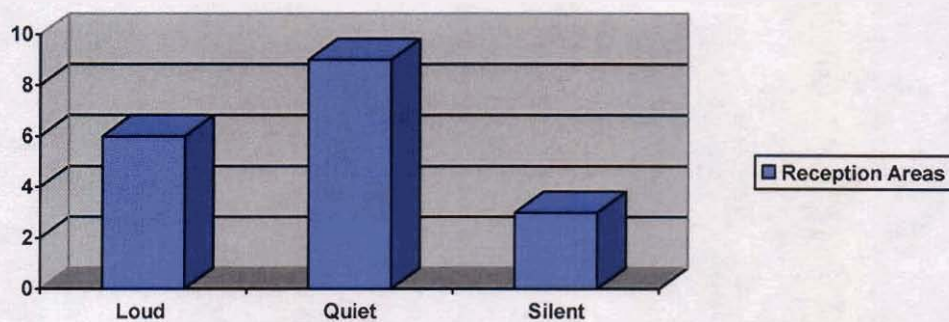
## Section 2

Section two of the observation worksheet asked the observers to assess the ambiance provided by receptionists.

### Question 5

The observers were asked: Is the noise level silent, quiet, or loud? The observers responded that six reception areas were loud, nine reception areas were quiet and three reception areas were silent.

Figure 5: Noise Level

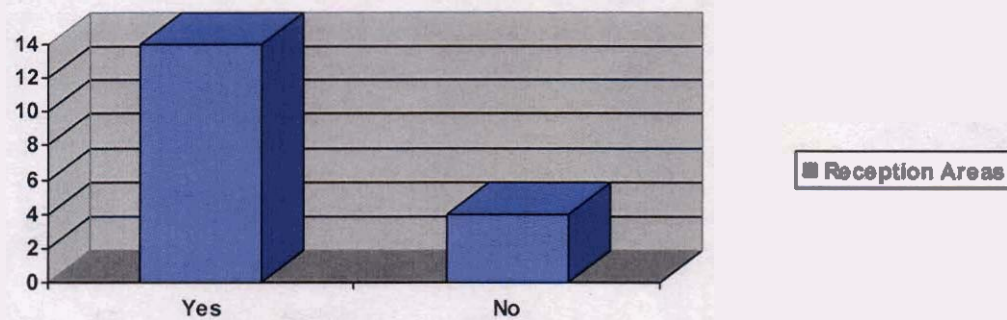


### Question 6

The observers were asked: Can you overhear personal conversations of the receptionists in the waiting area? The observers responded that they could overhear

personal conversations in fourteen of the reception areas, and could not overhear personal conversations in four of the reception areas.

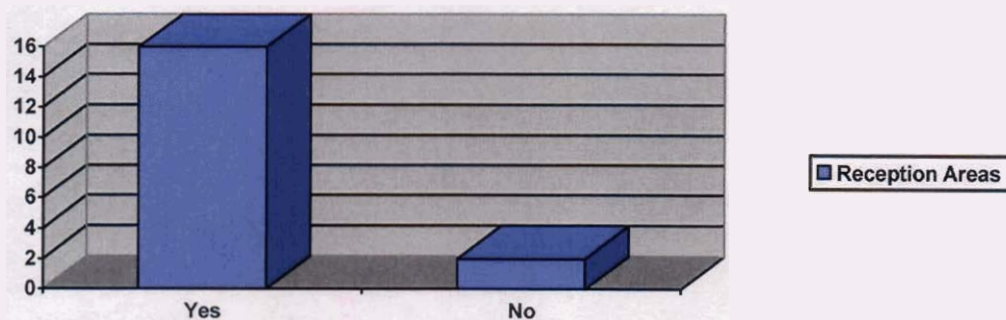
Figure 6: Personal Conversations



#### Question 7

The observers were asked: Can you overhear phone conversation of the receptionists in the waiting area? The observers responded that they could overhear phone conversations sixteen of the reception areas, and could not overhear phone conversations in two of the reception areas.

Figure 7: Phone Conversations



### Question 8

The observers were asked: Does the reception area appear organized or disorganized? The observers responded that all (100%) of the reception areas appeared organized.

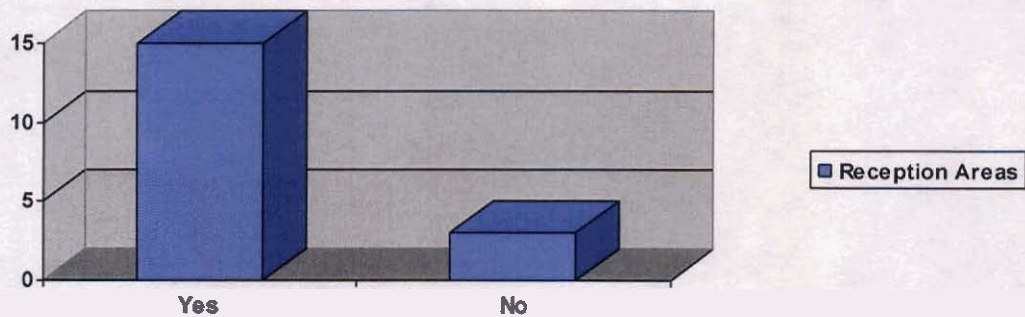
### Section 3

Section three of the observation worksheet asked the observers to assess the answers provided by receptionists.

### Question 9

The observers were asked: Did the receptionists answer the patient's questions? Thee observers responded that fifteen reception areas were able to answer patient questions while three reception areas were not able to answer the patient's questions.

Figure 8: Patient Questions Answered



### Section 4

Section four of the observation worksheet asked the observers to assess the attitude provided by receptionists.

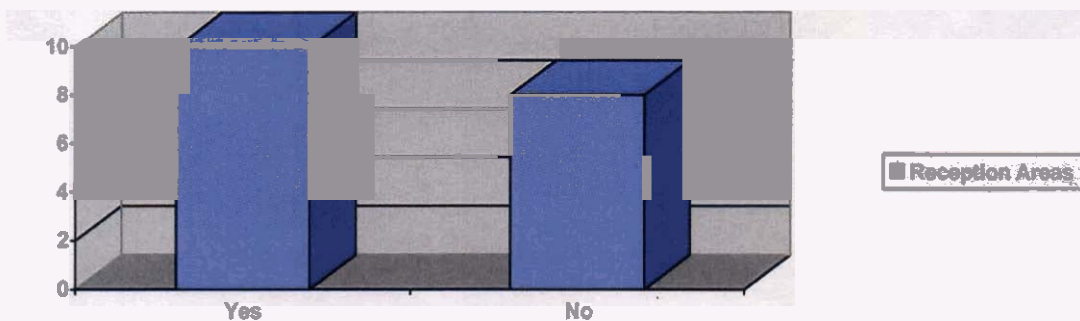


### Question 10

The observers were asked: Did the reception staff greet the patient's with a smile?

The observers responded that ten reception areas greeted patients with a smile and that eight reception areas did not greet patients with a smile.

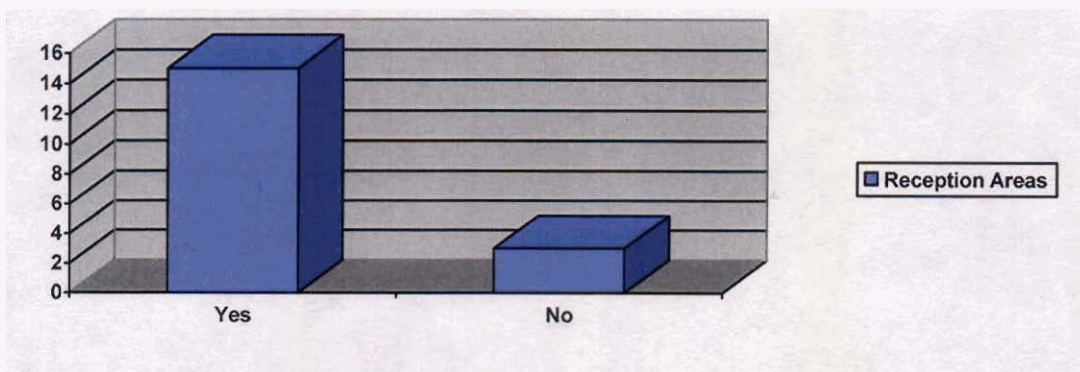
Figure 9: Smile



### Question 11

The observers were asked: Did the receptionists make eye contact with the patients? The observers responded that fifteen reception areas made eye contact with patients and that three reception areas did not make eye contact with patients.

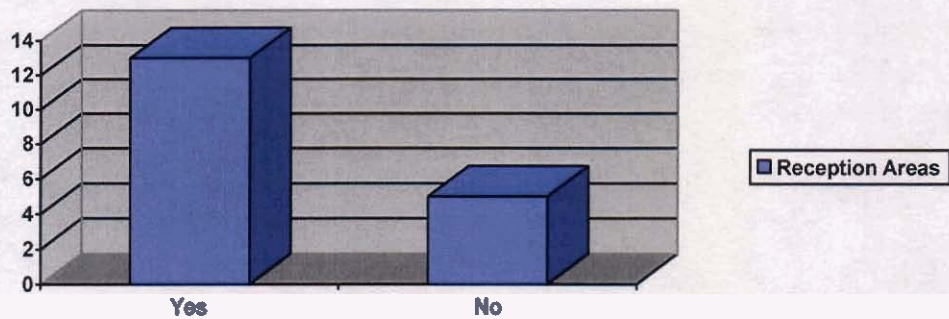
Figure 10: Eye Contact



### Question 12

The observers were asked: Did the receptionists use a sincere tone of voice with the patients? The observers responded that thirteen reception areas used a sincere tone of voice and that five reception areas did not use a sincere tone of voice.

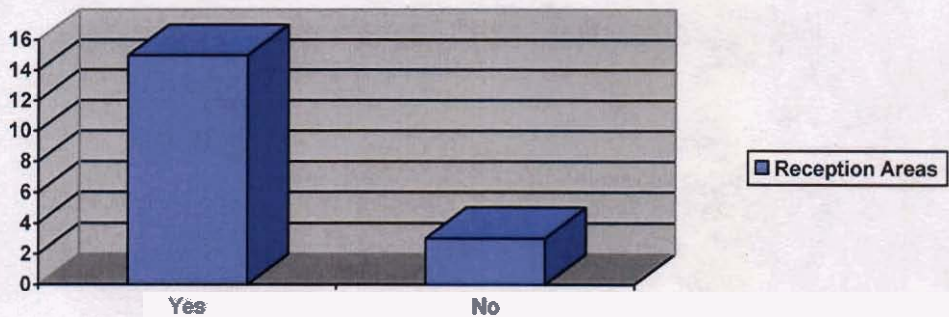
Figure 11: Tone of Voice



### Question 13

The observers were asked: Did the receptionists act professional toward their coworkers? The observers responded that fifteen reception areas acted professional toward their coworkers and three reception areas did not act professional toward their coworkers.

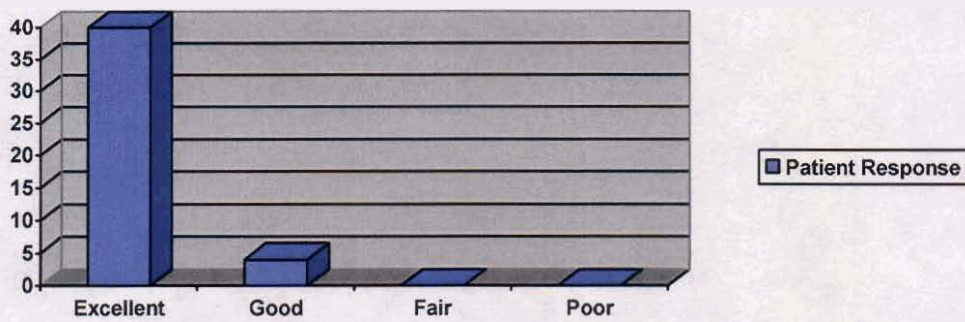
Figure 12: Professionalism



### Informal Follow Up Survey Findings

Patients who completed a "How'd We Do?" comment card were asked to rate Advanced Healthcare's reception customer service as excellent, good, fair, or poor. Out of the forty-four respondents, forty of them rated Advanced Healthcare reception staff as excellent and four of them rated Advanced Healthcare reception staff as good.

Figure 13: How'd We Do Comments



#### Question 1

Patients who rated Advanced Healthcare reception staff customer service as excellent were asked: Why did you rate the customer service you received by Advanced Healthcare's reception staff as excellent?

The forty patients responded:

Table 5: Why Customer Service is Excellent

1.	"Just really good", friendly, ready to help. Nice not to have to wait.
2.	great, no complaints, helpful
3.	The receptionists are always courteous and full of smiles.
4.	Prompt, Courteous, Efficient, Businesslike, Friendly



5.	Friendly & nice, good.
6.	Lynn was outstanding. Walked me through everything. Greeting me with smiles and hello. Wonderful customer service.
7.	Has been with Dr. for a long time. Very knowledgeable and friendly. Always has a smile. Knows what forms are needed with 1st of the year insurance changes. May be on the telephone with a patient, but gives that patient her attention until she is finished.
8.	Very, very, very good
9.	Judy did not correct a patient who said she made a mistake, instead said "I'm sorry, I must have been mistaken." This was done with a smile on her face and in her voice. Debbie, receptionist called to reschedule an appt. Also great.
10.	Maureen is always a tremendous help and extremely efficient. Great friendliness & professionalism.
11.	Sandra is always nice, friendly and cooperative. She is good.
12.	Super friendly, but still does her work. Gives you as much time as she can. Helpful. Good attitude. Makes you feel important. You are someone, not just a number.
13.	Isabella was very polite and helpful
14.	Quick Efficient Courteous
15.	Pleasant and helpful
16.	The people in the registration area are friendly and respectful.
17.	Very friendly and polite
18.	Both the "meeter-greeter" (Georgia) and the tech (Laurie) were pleasant and efficient as well as the receptionist (Stephanie). The attitude of all was excellent.
19.	Connie at Front Registration was absolutely wonderful. Very pleasant and courteous! It was nice to be greeted with her smile.
20.	Very efficient in her job. Would not hesitate to come back.
21.	The receptionist and assistant were also very friendly and courteous.
22.	The receptionist was very nice.
23.	Services have continued to improve vastly. Am very pleased with all aspects of care.
24.	Friendly and caring
25.	I am very happy with my doctor and with all the services and people at this clinic. Everyone was very friendly. I felt like I matter to you.



26.	All staff is very friendly.
27.	The front receptionist was VERY friendly.
28.	Cathy and Dawn are wonderful. They help keep me and my family healthier. The phone nurse service is so valuable to me. I trust her and appreciate the care, attention and respect she treats me with. I also appreciate all the staff's friendliness.
29.	HPC staff is above bar on all accounts. They are a team from the receptionist to the docs to the nurses and lab tech's, etc. They are a joy to work with. They are always friendly and kind and very helpful.
30.	They make me feel comfortable. They are helpful and pleasant. I have known Sandra for many years. She is a super gal. She knows her stuff. She is helpful with taking messages and sending them to the Dr. in the computer. They are not snotty.
31.	Treated with respect, always fast service
32.	No concerns
33.	I have nothing but the highest praise for everyone I have come in contact with at your facility and would highly recommend it to anyone.
34.	The receptionist, Connie, is very attentive. I look for her service all the time.
35.	Receptionist was really really helpful and nice
36.	Always willing to help. Don't have to wait. All pleasant.
37.	Friendly
38.	I have taken my children here since they were babies. I will always refer your staff to everyone as being the best. All staff is very nice and courteous and professional. Tamika, front desk receptionist, is very positive. I look forward to her being there because I know she will help me and she will get the direction I need. She is pleasant and professional.
39.	Maureen is a very nice lady. She recognizes my voice on the phone. That kind of recognition is important to people. She is very helpful. If we are walking through the clinic to another area she waves hello.
40.	Your entire staff - especially scheduling/reception workers are the reason my family continues to choose this facility for our healthcare needs.

## Question 2

Patients who rated Advanced Healthcare reception staff customer service as good were asked: Why did you rate the customer service you received by Advanced Healthcare's reception staff as good?

The four patients responded:

Table 6: Why Customer Service Was Less Than Excellent

1.	The receptionist was kind.
2.	I got in right on time and was treated extremely well. I've never had such a good experience at your clinic.
3.	When they were waiting for the receptionist at the Dr's office she ignored them and acted like they weren't there
4.	Receptionists should pay more attention to the patient. Some times I've waited in line while the receptionists have a personal conversation (non-work related) amongst themselves.



## CHAPTER V

### DISCUSSION AND RECOMMENDATIONS

#### Introduction

This study is essential to bring up the standards of Advanced Healthcare. It is the organization's goal to be the preferred physician healthcare organization in southeastern Wisconsin. It is only when patients perceive the customer service they receive from Advanced Healthcare's receptionists is excellent that Advanced Healthcare will see a significant improvement in survey results.

The purpose of this study is to develop customer service training for new and existing receptionists at Advanced Healthcare's to improve customer service. This chapter will discuss the following objectives of the study.

1. To identify the needs of reception staff at Advanced Healthcare to improve customer service.
2. To provide receptionists with the tools necessary to provide excellent customer service that is in line with Advanced Healthcare's strategic plan.
3. To develop a curriculum for receptionists in line with Advanced Healthcare's strategic plan.

#### Research Objective One Results

The research objective was to identify the needs of the reception staff at Advanced Healthcare to improve customer service. This objective was met in two ways by asking the reception supervisors what skills do you feel your staff are missing, and by completing waiting room observations.

The supervisors had a variety of responses when answering the question of what skills do you feel your staff are missing. The researcher grouped the responses into the following four categories: stress management, professionalism, communication skills,

and technical skills. Out of twenty-nine responses, seven (24%) of the responses were assigned to the stress management category, eleven (37.9%) of the responses were assigned to the professionalism category, eight (27.6%) of the responses were assigned to the communication skills category, and three (10%) of the responses were assigned to the technical skills category.

Two observers were asked to rate receptionists in the four areas of customer service that coincide with Advanced Healthcare's customer service strategy: access, ambiance, answers, and attitude. Based upon the answers provided by the observers Advanced Healthcare receptionists have fallen short in every area.

The only question that received a 100% positive response was: Does the reception area appear organized or disorganized? However, the remaining questions asked in the ambiance section of the worksheet that did not receive as positive of a rating. There are gaps in all of the areas of customer service that align with Advanced Healthcare's customer service strategy. The researcher feels that the reception staff needs to improve customer service in every area of importance in Advanced Healthcare's Customer Service Strategy, meaning there needs to be emphasis placed on the importance of access, ambiance, answers, and attitude with the reception staff.

#### Research Objective Two Results

The research objective was to provide receptionists with the tools necessary to provide excellent customer service that is in line with Advanced Healthcare's strategic plan. By reviewing the patients' responses who rated Advanced Healthcare's customer service as excellent the researcher was able to determine the patient's perception of excellence. Since it is only when patients perceive the customer service they receive from



Advanced Healthcare's receptionists is excellent that Advanced Healthcare will see a significant improvement in survey results this information is very important.

Forty-five percent of the patients who responded when asked why they rated Advanced Healthcare's reception staff as excellent responded by saying that the staff was friendly. Twenty percent of patients stated that they rated the receptionists as excellent because they feel they are helpful; while fifteen percent rated the receptionist as excellent because they feel the receptionists are nice and courteous.

### Research Objective Three Results

The research objective was to develop a curriculum for receptionists in line with Advanced Healthcare's strategic plan. This objective was met with all of the results of the study conducted are considered.

The results of each portion of the study, which are described in depth in Research Objective One Results and Research Objective Two Results sections of this chapter, indicate that there is room for improvement in all areas of customer service. Access, ambiance, answers, and attitude are the foundation of Advanced Healthcare's strategic plan which Advanced Healthcare's reception staff has fallen short in every area. This is proven by the Waiting Room Observation Results. The researcher believes that it is important for Advanced Healthcare's receptionists to strive to meet the patient's expectations of excellence in every patient encounter. The Informal Follow-up Survey results provide a clear answer to what those expectations are; therefore the researcher feels that these results and techniques to meet these expectations should be incorporated into the customer service training for the reception staff. The supervisors also identified areas where they feel their employees need improvement. The researcher was able to

simplify the results into four categories which the researcher feels should be included in the curriculum developed for the reception staff. The categories are professionalism, stress management, communication skills, and technical skills which can aid in providing excellent customer service.

### Recommendations

Advanced Healthcare's reception staff plays a key role in customer service excellence for the organization. Receptionists are often the first and last contact a patient has with a clinic. The receptionist checks in each patient, answers patient questions over the phone, and schedules follow-up appointments for the physicians. Though Advanced Healthcare has a customer service strategy in place, the reception staff is not meeting the expectation of excellence established by Advanced Healthcare as an organization.

It would be beneficial for the reception staff to have a clearer understanding of the part they play in providing excellent customer service as well as to have strategies in place to successfully achieve Advanced Healthcare's goals of excellence. Training the reception staff in professionalism, communication skills, stress management, and technical skills can help the reception staff achieve excellence by setting customer service expectations and providing the necessary tips and strategies for success. However, training the reception staff is not enough. It is the responsibility of the reception staff to utilize the skills covered in the training sessions, and the responsibility of the supervisor to continually coach their staff to ensure they are providing excellent customer service.

Advanced Healthcare's reception staff needs to feel valued and respected for their role within the organization. To some extent the reception staff knows what to do in order to achieve the goals established by the organization but are choosing not to perform in a

way that meets the expectations of the organization. In the future it would be helpful to ask the reception staff what they feel they can do to improve the customer service they provide both individually and as a department. Advanced Healthcare can value and respect their opinions by utilizing their ideas and possibly incorporating them into the training sessions. In this study the reception enhancement team consulted many groups for their opinions in how to improve customer service in the reception departments, however, the reception staff themselves were not surveyed. I think that that would be an important step to take to find out why the reception staff is executing customer service at a less than excellent level.

Advanced Healthcare also knows that there are four key questions in the patient satisfaction survey that indicate whether or not a patient customer would refer a friend or family member to Advanced Healthcare. Those questions measure the personal manner of the physician, the technical ability of the physician, access, and the personal manner of the receptionist. With this in mind it is important for Advanced Healthcare to focus on the customer service provided by the reception staff to ensure that the business continues to be profitable and eventually achieves its goal of becoming the preferred physician healthcare organization in southeastern Wisconsin.

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## APPENDIX A

### Supervisor Focus Group Questions

#### Question 1

What skills do you feel your receptionists are missing?

#### Question 2

What do you think your reception staff would ask for?



## APPENDIX B

### Waiting Room Observation Worksheet

Clinic Site \_\_\_\_\_

Department \_\_\_\_\_

#### ACCESS

1. On average, how long did patients wait to talk to a receptionist?

☐ No wait    ☐ 1-3 minutes    ☐ 4-7 minutes    ☐ More than 7 minutes

2. On average, how long did patients wait before they were called by the nurse?

☐ 0-4 minutes    ☐ 5-9 minutes    ☐ 10+ minutes

3. Were the patients welcomed by the reception staff?

☐ Yes    ☐ No

4. Were the glass sliding windows separating the receptionists from the patients kept open or closed?

☐ Yes    ☐ No    ☐ N/A

#### AMBIANCE

5. Is the noise level silent, quiet, or loud?

☐ Silent    ☐ Quiet    ☐ Loud

6. Can you overhear personal conversations of the receptionists in the waiting area?

☐ Yes    ☐ No

7. Can you overhear phone conversation of the receptionists in the waiting area?

☐ Yes    ☐ No

8. Does the reception area appear organized or disorganized?

☐ Yes    ☐ No

## ANSWERS

9. Did the receptionists answer the patient's questions?

☐ Yes ☐ No

## ATTITUDE

10. Did the reception staff greet the patient's with a smile?

☐ Yes ☐ No

11. Did the receptionists make eye contact with the patients?

☐ Yes ☐ No

12. Did the receptionists use a sincere tone of voice with the patients?

☐ Yes ☐ No

13. Did the receptionists act professional toward their coworkers?

☐ Yes ☐ No

## APPENDIX C

### Informal Patient Follow Up Survey Questions

#### Question 1

Why did you rate the customer service you received by Advance Healthcare's reception staff as excellent?

#### Question 2

Why did you rate the customer service you received by Advanced Healthcare's reception staff as good?